

SCHOOL BASED ADMINISTRATIVE CLAIMING (SBAC)

OVERVIEW

Recently your district attended a regional meeting on SBAC and expressed interest in participating in the SBAC program beginning in the January – March 2004 quarter. The Kentucky Department of Education has entered into a contract with MAXIMUS to assist school districts in claiming reimbursement for Medicaid eligible administrative functions performed by school personnel. To obtain reimbursement each school district must first identify the employees and contractors that should participate in the Random Moment Sampling time study. The MUNIS software has been modified to produce the required employee roster. This document provides guidance on identifying appropriate school employees in MUNIS in order to produce the SBAC required report.

NOTE: The SBAC report is only available in MUNIS version 2003 and above!
Please verify with your finance officer that your MUNIS system has been upgraded to MUNIS 2003.01.mr before attempting to run the report!

EMPLOYEES ELIGIBLE FOR REPORTING

The first step in creating your employee roster is to identify the employees and contractors that should participate in the Random Moment Sampling time study. Please refer to your District Coordinators' Handbook, Section 2, provided at the regional meeting for guidelines for choosing time study participants, or you may go to <http://www.maximusschools.com/ktraining.html> to obtain this information. Once your district has determined the appropriate employees to include on your employee roster, you can assign an attribute to these employees for inclusion in the SBAC report.

To Assign Employees for SBAC Reporting, Select:

Payroll/Personnel

B) Employee Maintenance/Reports

A) Employee Master F/M

The screen on the following page is displayed.

Munis Main Menu - 2003mr Test Database - bpelletti

System Edit Windows Favorites Financials Payroll/Personnel Revenue/Billing Other Admin Help

EMPLOYEE MASTER F/M - 2003mr Test Database

Action

Employee Number

Social Security No

Employee Name Last First M Suf

Active Status ☐

Primary Job Class

Primary Location

Primary Group/BU

Primary Pay Frequency

Primary Org/Obj/Proj

Personnel Status ☐

Check/Office Location

Display screen 2 of data. NUM OVR

Select employees to assign for SBAC reporting:

1. Select the **Find** icon (magnifying glass).
2. Enter employee number(s) or name to select the employee.
3. Press **Esc** or select the **Check Mark** icon.
4. If the appropriate employee to assign to SBAC displays, select the **Menu** button. The following screen appears:

Munis Main Menu - 2003mr Test Database - bpelleti

System Edit Windows Favorites Financials Payroll/Personnel Revenue/Billing Other Admin Help

EMPLOYEE MASTER F/M - 2003mr Test Database

OK

Employee Number

Social Security No

Employee Name Last First M Suf

Active Status ACTIVE

Primary Job Class INSTR

Primary Location OWINGS

Primary Group/BU CLASSI

Primary Pay Frequency SEMI-MONT

Primary Org/Obj/Proj

Personnel Status FULL TIME

Check/Office Location

USER DEFINED FIELDS

JOB, SALARY, ACTIONS

RECURRING PAY

DEDUCTIONS/BENEFITS

EMPLOYEE DETAIL HISTORY

ACCRUALS/ATTENDANCE

PERSONNEL ASSIGNMENTS

RETIREMENT DATA

EMPLOYEE CERTIFICATIONS

EMPLOYEE EVALUATIONS

PERSONNEL ACTIONS

Prev Next Run Exit

1 of 1

Run program selection menu

NUM OVR

- Double click on the “**USER DEFINED FIELDS**” menu item. The following screen appears:

Munis Main Menu

System Edit Windows Favorites Financials Payroll/Personnel Revenue/Billing Other Admin Help

EMPLOYEE USER DEFINED FIELD F/M - 2003mr Test Database

Action

Global

Exit

Emp # Last First

SSN

Field ID Code

Date

Code

Description

Add/Del data item for selected employees.

NUM OVR

6. Select the **Add** icon (blank sheet of paper) or type “a” to add
7. The employee number and name will appear
8. Enter “**SBAC**” into the “Field ID Code”

Repeat these steps until all eligible employees are assigned.

PRODUCING THE EMPLOYEE ROSTER REPORT

After all employees are assigned for SBAC reporting, the district may produce the Employee Roster report. This report lists information regarding all employees eligible for random moment time study participation.

To Create the Employee Roster Report, Select:

Payroll/Personnel

- F) Retirement / State-Specific
 - B) State of Kentucky
 - N) Medicaid Reimburse SBAC Report

The following screen is displayed:

Munis Main Menu - 2003mr Test Database - bpelletti

System Edit Windows Favorites Financials Payroll/Personnel Revenue/Billing Other Admin Help

KENTUCKY SBAC REPORT - 2003mr Test Database

Action

Define

Exit

Hire Date 01/01/1900 to 11/09/2003

Location to ZZZZ

Org to ZZZZZZZZ

Define output options.

NUM OVR

1. Select the **Define** button
2. Ensure the report includes all Hire Dates, Locations and Orgs.

3. Press Esc or click on the check mark icon.
4. Click on the Excel icon to produce the report in Microsoft Excel format. MAXIMUS (administrators of this program) requires the report in Microsoft Excel format.
5. Microsoft Excel will open and all active employees that are assigned for SBAC reporting (per instructions above) appear in the report. If any employees are missing or ineligible employees appear, check that the employee is/is not designated with the SBAC code and the employee is active ("Active Status" on Employee Master record is "A").
Subcontractors that are not paid through the payroll system should be added manually to this excel spreadsheet.
6. Save the Excel spreadsheet using the 'Save As...' command from Excel's 'File' menu to save the file as a renamed file, using the following naming scheme:

[Your district name] Roster Q01-04.xls

NOTE: In the above naming scheme, 'Q1' identifies the calendar quarter to which the file pertains (Q1=Jan-Mar, Q2=Apr-June, Q3=July-Sept, Q4=Oct-Dec). The last two digits identify the calendar year (example: 04=2004). The SBAC program utilizes a calendar year quarter not a fiscal year quarter.

Attach the file to an e-mail message and send to:

KYSBAC@MAXIMUS.COM using the subject line "KY RMS Employee Roster,"

OR

Save the file to a diskette and mail to:

David Pardo
MAXIMUS, Inc.
1949 Commonwealth Lane
Tallahassee, FL 32303

MAXIMUS CANNOT ACCEPT FAXED VERSIONS OF YOUR EMPLOYEE ROSTER FILE

After you have completed your Employee Roster, print out a copy for your audit file.

Questions or Problems

If you need assistance in completing or submitting your employee roster, please contact the MAXIMUS Help Desk at (800) 647-9089.

NOTE: The EMPID column in the Excel spreadsheet is a combination of the district number and MUNIS employee number. Please do not adjust this field.